

STORE + TRACK YOUR DATA: Introduction to Airtable and Integrations

Purpose: There are many online programs that can help you manage your data more effectively. The problem is, there is an overwhelming number of these programs, and it can be a little intimidating to sort through what seems like an endless number of options. Airtable is a great tool because unlike many other options, its free version has a lot of functionalities that

can be useful for your work. This emPower Tool will provide an overview of what Airtable is and how you can make the most of its free version.

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What is Airtable?

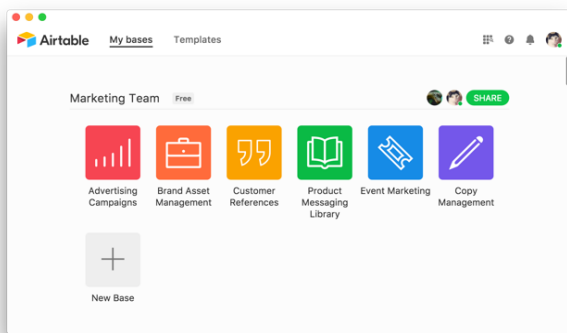
Think of Airtable as a spreadsheet application (like Excel) that has the capabilities of a database (like Apricot or Access). It is user-friendly, so you don't need to have coding experience to use it.

Signing up is simple by going to www.airtable.com. You can use Airtable to store data in a spreadsheet format that is visually appealing and easy to use, and at the same time, it's powerful enough to act as a database that you can use for project planning and client relationship management.

Where do I get support?

Airtable offers great support resources: support.airtable.com/hc/en-us. There is also a community of users that regularly posts and answers questions that come up: community.airtable.com. As always, YouTube also provides many tutorials. Gareth Pronovost's channel is particularly helpful: youtube.com/user/GarethPronovost.

Setting up a Base



An Airtable "base" contains all of the information you need for a particular project or collection. This is similar to a workbook in Excel or Google Sheets.

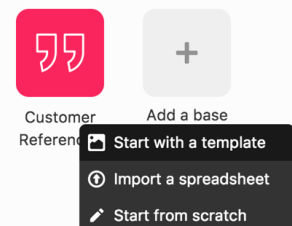
Each base shows up as a square icon on your Airtable homepage. Each base can have multiple tables (the equivalent to tables would be sheets in a workbook in Excel or Google Sheets). For example, a base for your organization could have separate tables for clients, donors, and volunteers.

One of the nice features of Airtable is that you aren't limited to viewing your tables as flat grids; you can see them as calendars, kanban boards, or surveys.

You can create your first base from one of the many Airtable templates in airtable.com/templates. Once you create the base with a template, you can customize it to suit your needs.

There are a few nonprofit templates that may be helpful. Go to airtable.com/templates, and in the search box, enter "nonprofit". The results are limited, so you might consider creating your own base!

Campaigns Management Marketing



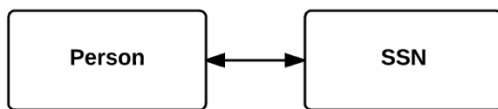
Working with Fields and Records in a Base

Once you are in a base, it is important to set up your field (or column) types because this will allow you to store rich content in each record. For example: a table with client data can contain different types of records, such as single line text (for names), dates (for birthdates), checkboxes (for race/ethnicity), and links to records in another table that contains information on home visitors.

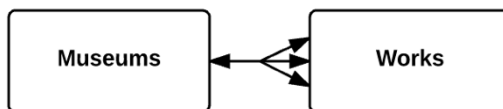
Linking Records

One of the most useful features of Airtable is its ability to link records between tables. The records can be linked in different ways:

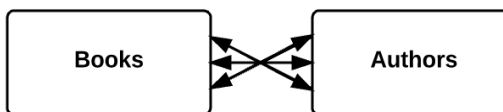
One-to-One



One-to-Many



Many-to-Many



Example: Let's say you set up Table 1 to collect your clients' data (name, contact information, demographic information, progress, etc.) for four different workshops you organize, and each workshop takes place over a span of six weeks.

You may want to keep track of each client's attendance in each workshop. To do so, you can set up Table 2, link a field (most likely the "name" field) to Table 1, and track each client's attendance throughout all the weeks of workshops.

Since the two tables are linked by client name, every time you enter attendance information in Table 2 for a client, it will automatically show up for that client in Table 1.

This example would use a "one-to-many" relationship, since a client would be linked to different weeks of workshop attendance.

To learn more about linked fields, see: support.airtable.com/hc/en-us/articles/218734758

Doing Basic Analysis

With the linked Table 1 and 2 example, above right, you can now do some basic analysis!

Example: You want to know how many times each client attended the June Parenting Workshop. You can do this by combining two useful functions: "filter" and "rollup" in Table 1.

The *filter* function allows you to see only the clients who attended the June Parenting Workshop. You can then use the *rollup* function to automatically count and show how many times each client attended that workshop (data from Table 2).

There is a long list of other mathematical functions you can use in rollup, such as "sum", "max", and "average." See: support.airtable.com/hc/en-us/articles/203255215-Formula-field-reference.

Airtable Integrations:

Airtable can be integrated with other apps, such as **Google Drive** and **JotForm**. Like Airtable, JotForm also has a good free version.

JotForm is an online software that makes it easy to create forms and collect data. While an Airtable table can also be set up as a form, JotForm has some more functionalities, like being able to break a form up into sections/pages, or integrating a form with payment apps, such as **Stripe**. Sign up for an account here: www.jotform.com.

Example: Let's say you have already established an Airtable base with data on clients you serve. Let's also assume that you offer different workshops to both *current* clients and *potential* clients.

You can set up a registration form in **JotForm** that would collect contact and demographic data for each participant: You could then integrate the same form with **Stripe** to allow participants to pay for the workshop when they register. An This Airtable-**JotForm** integration automatically uploads data from the registration form to your existing Airtable!